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ABSTRACT

Supporting performance objective 1 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on determining requirements and layout for office furnishings are included in this packet. (The packet is the third in a set of three on organizing and planning--CE 016 987-989.) The student materials include three instruction sheets, graphed layout sheets, check-out activities, and the instructor's final checklist. The instructor's manual includes notes to the teacher. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the three packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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ED155478

ORGANIZING AND PLANNING
DETERMINING OFFICE LAYOUT

STUDENT MANUAL

Materials in this Lesson
have been

Modified by

Pat Chapman

from
Materials Developed and Graciously Provided by
Bureau of Vocational Education, State Department of Education
and
Department of Vocational Education
College of Education, University of Kentucky

These materials support
Performance Objective 1 of the
V-TECS Secretarial Catalog

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

I. LEARNING ACTIVITY PACKAGE ON DETERMINING REQUIREMENTS AND LAYOUT FOR OFFICE FURNISHING

Correct planning and graphing of physical layout of furniture and equipment for an area, especially within a company, is a very important aspect of effectively using present or new facilities to the highest degree possible. You as a prospective clerical office worker or office employee may need to help in making these decisions when needed. As you will learn, proper planning for designing an area can only be accomplished if proper personnel are used—if for no other reason than to receive ideas or suggestions for change from the proper people.

II. PERFORMANCE OBJECTIVE

Given two case situations in which it is required to determine the necessary furnishings within a given budget and to plan an efficient and attractive office layout, determine the furnishings needed and plot a suggested layout on graph paper. Responses to both situations must be acceptable to the instructor, considering budget and selections.

III. PREREQUISITES

The student should have taken or currently be enrolled in office procedures.

IV. LEARNING RESOURCES

Provided	Instructor will Provide
Learning Activities in Packet	Office furniture catalogs.

V. LEARNING ACTIVITIES

Kentucky materials follow.

LEARNING ACTIVITIES

1 READ Instruction Sheet I, INTRODUCTION TO LAYOUT.

(or)

2 READ Instruction Sheet II, PREPARATION.

(or)

3 CHECK YOUR KNOWLEDGE of plotting furniture and equipment on graph paper by completing Student Self-Check I, DRAWING OFFICE LAYOUT.

4 READ AND COMPLETE activities on Instruction Sheet III, LAYOUT PLANNING.

5 CHECK YOUR KNOWLEDGE by submitting your work to your instructor for approval or suggestions.

6 ARRANGE with your instructor to complete this module by doing the CHECK-OUT ACTIVITIES.

Instruction Sheet I

INTRODUCTION TO LAYOUT

You've been working for Ace Manufacturing Company for more than a year now and have become familiar with most phases of the business and how each department depends upon the other and how the company organizes and maintains its records and transactions.

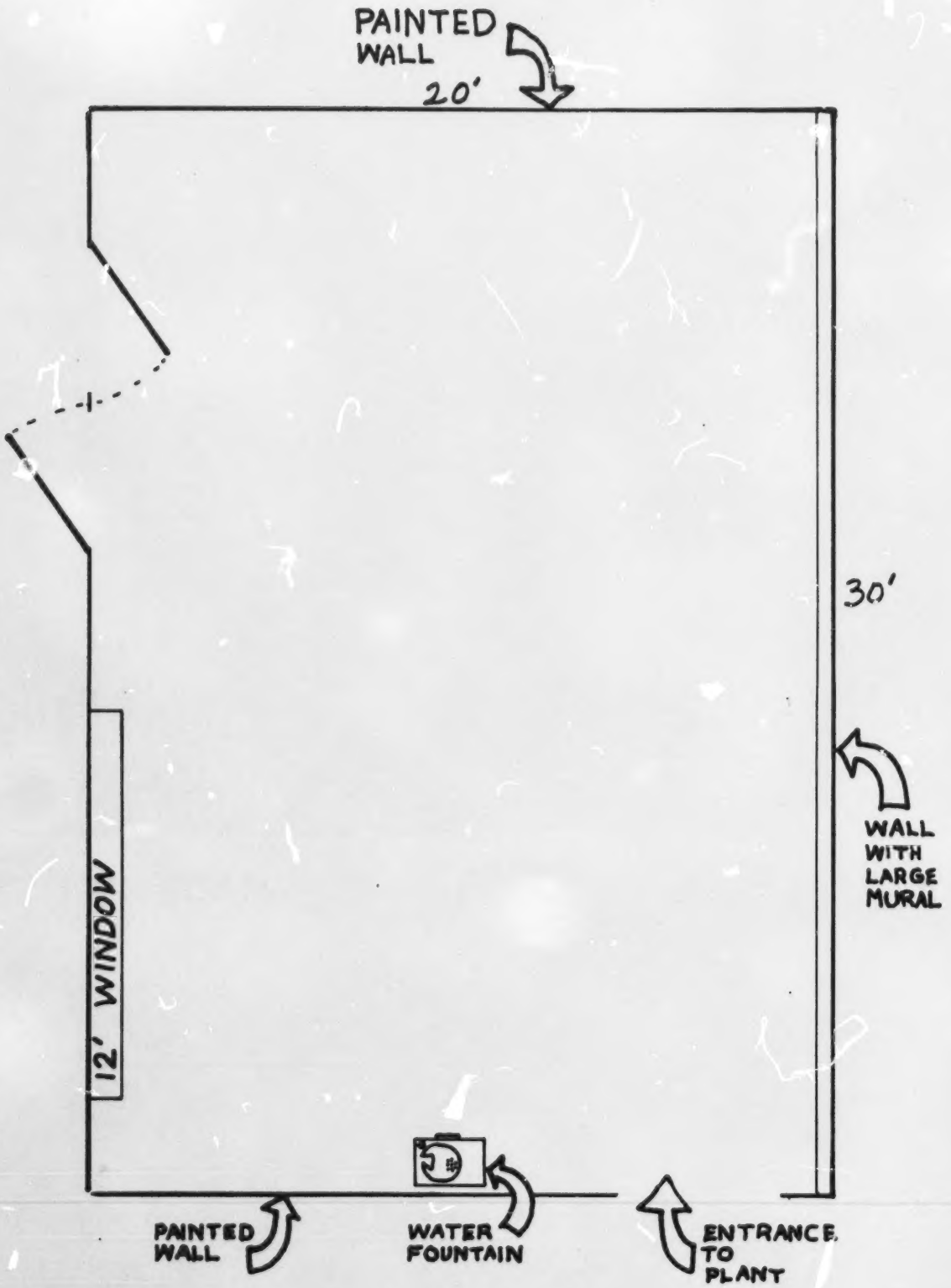
You presently work in the Purchasing Department as a secretary/receptionist and have been doing an outstanding job.

The vice-president of the company has called you into the office and asked you to help in layout and planning for part of the building. The section being renovated will be occupied by a new reception area which should seat approximately 15 – 20 guests, an area for reading, and a receptionist area. Except for the telephone system, you are given a sketch (see page 5) of how the area will be constructed, size of room, walls and doors placement.

The vice-president has asked you to check as many office furniture and supply catalogs as you can obtain, to call local firms for bids or suggestions on furnishing the room – but not to hire an interior decorator. A budget of $6,000 should be an adequate amount and should not be exceeded unless absolutely necessary. If you must exceed this figure, you should submit your sketched layout with the reasons. Carpet, lighting fixtures, and drapes would not have to be decided on at this time, since everything is still in the planning stages. There are electric typewriters in the building that could be used. (You know this would be an electric typewriter with elements.) This does eliminate your including a typewriter in your purchasing plans.

You comment to the vice-president that you appreciate the confidence in you and that you will try to complete the job as soon as possible.

I MUST PROVE I
CAN DO IT, BUT
WHERE DO I START?


PAINTED WALL
20'
30'
12' WINDOW
WALL WITH LARGE MURAL
PAINTED WALL
WATER FOUNTAIN
ENTRANCE TO PLANT

INSTRUCTION SHEET II

PREPARATION

As you return to your desk you realize this must be a well planned project so that the proper furniture and receptionist equipment and supplies will be considered for purchase. They must give an impressive appearance to the company visitors, hold up with use, and be easy to maintain. This room must also serve not only to promote efficiency in all office operations, but must also serve as an advertising medium for the firm and its products or services. It is, therefore, important that this room be well arranged and orderly, because the visitor creates his first impression of the company when he steps into the reception room.

You also realize that reading matter should be supplied to the visitors who may have to wait until received by employees of the company. Even though little work is done in the reception room, lighting should be provided for comfortable reading.

You are so enthused with this chance to prove yourself that you immediately begin to make a list of possible items that may be needed in the reception room. Your list may look something like this:

1. Chairs or lounges (Various seating capacity considered)
2. Tables
3. Lamps (End tables and/or oval cocktail tables)
4. Ashtrays or Ashtray stands
5. Waste cans
6. Coat racks (with or without umbrella holders?)
7. Magazine racks (or should we use tables?)
8. Receptionist desk and other large accessories
9. File cabinet or cabinets
10. If money permits, prints for wall, flower arrangements or other decorative items.

Student Self-Check 1

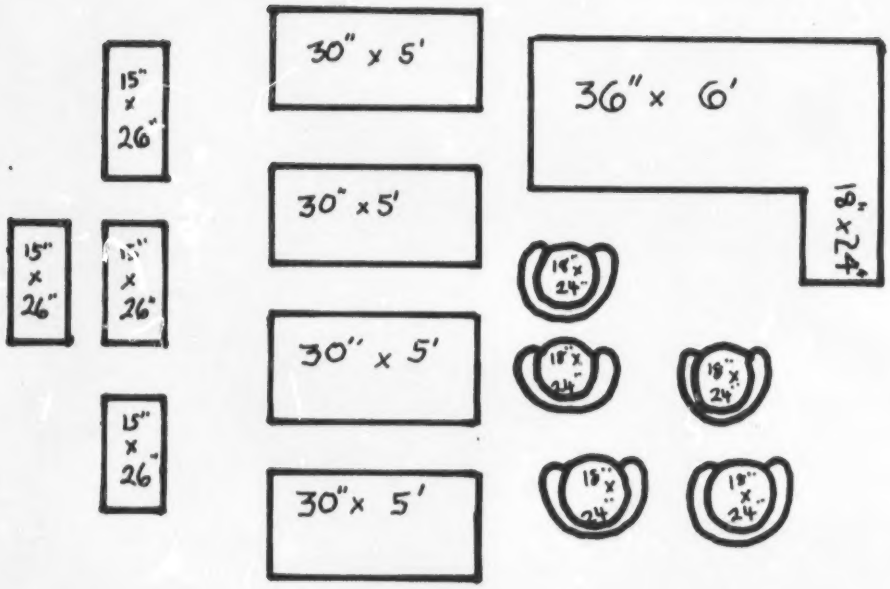
DRAWING OFFICE LAYOUT

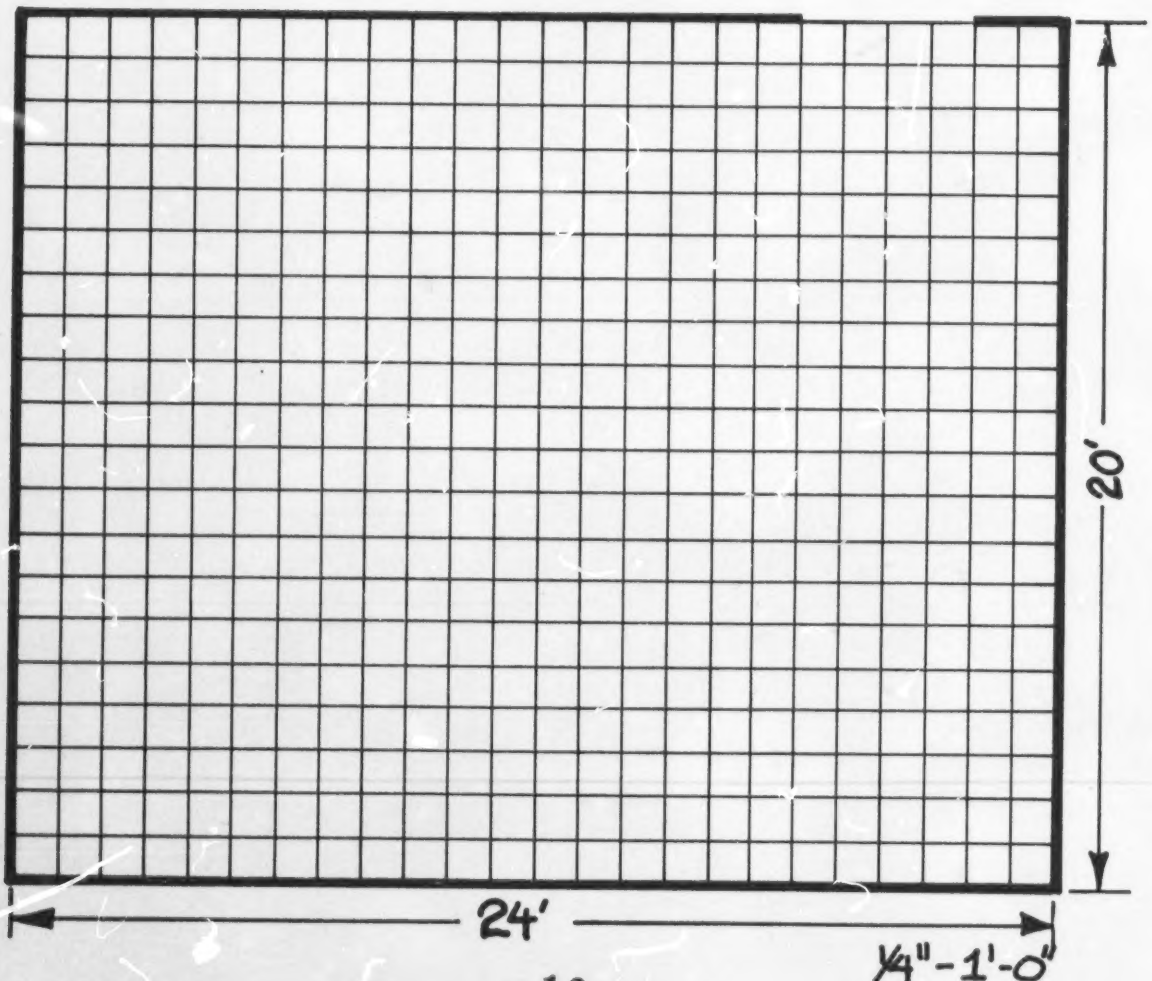
The following short exercise (see Illustration No. 1 on the next page) should help you in understanding the importance of deciding on and making office plans and layouts, as well as revising layout plans. The ability to work with plans is recognized by office managers, as well as office equipment and supply manufacturers, and is a valuable asset for clerical office workers.

Cut out the equipment drawn on Illustration I, (four desks, one L-shaped Secretarial desk, four file cabinets, and five chairs) and place it in a workable arrangement using the measurements given for each. Arrange the furniture on the graphed layout by pasting or taping in place. Use the scale ¼-inch square equals one foot. For now, use your own judgement for aisle space.

After completing your work on the Self-Check, compare your work with one possible arrangement given on Illustration 2 of this Self-Check.

Illustration 1





Student Self-Check I

POSSIBLE ANSWER SHEET FOR SELF-CHECK I

The following illustrates some good points which hopefully you thought about when you prepared your layout.

1. Receptionist or Secretary located near door
2. Adequate aisle space for desks, drawers, and chairs to move
3. File cabinets divided to eliminate congestion
4. Enough space allowed for drawers of files to be opened fully
5. File cabinets placed on a walled area

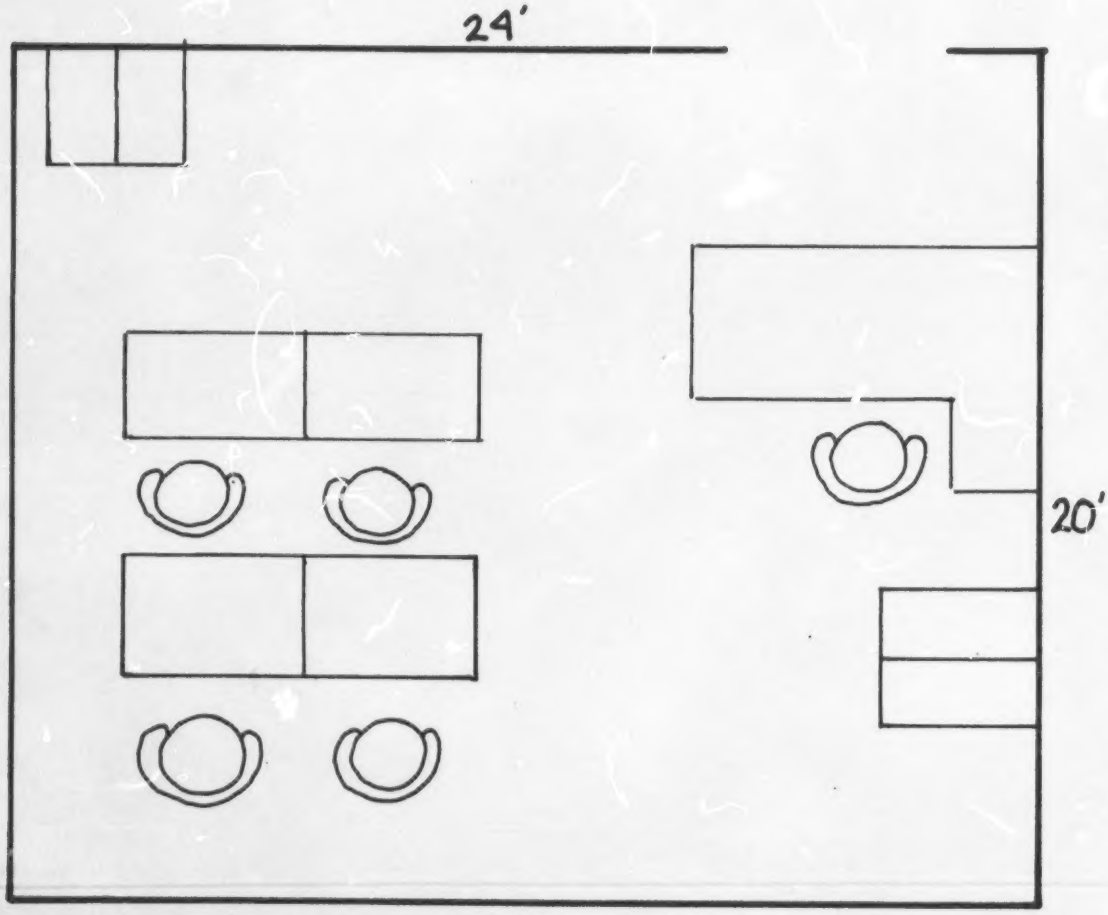


Illustration No. 2

INSTRUCTION SHEET III

LAYOUT PLANNING

You list the following work notes in order to help you plan your layout efficiently:

1. Obtain as many up-to-date catalogs for office-type furniture as you can find in the school or office, or by calling or stopping by stores or companies. Bring these catalogs and materials into your teacher or add them to the class library when you have finished using them.

2. Read or obtain measurements for furniture you decide should be used so you can begin furnishing the room within the allotted space (with teacher's permission, cut out items if needed.)

3. Make sure you plan a good color scheme with furniture – a cheerful atmosphere is appreciated by all.

4. Obtain any information you can on the brand of furniture and equipment you want, – how it ,old up with normal use and cleaning care, and any other points in favor of purchasing your choice (i.e., a company reputation for guaranteeing their products, or how close or easy it may be to have faulty equipment or furniture replaced or serviced as needed).

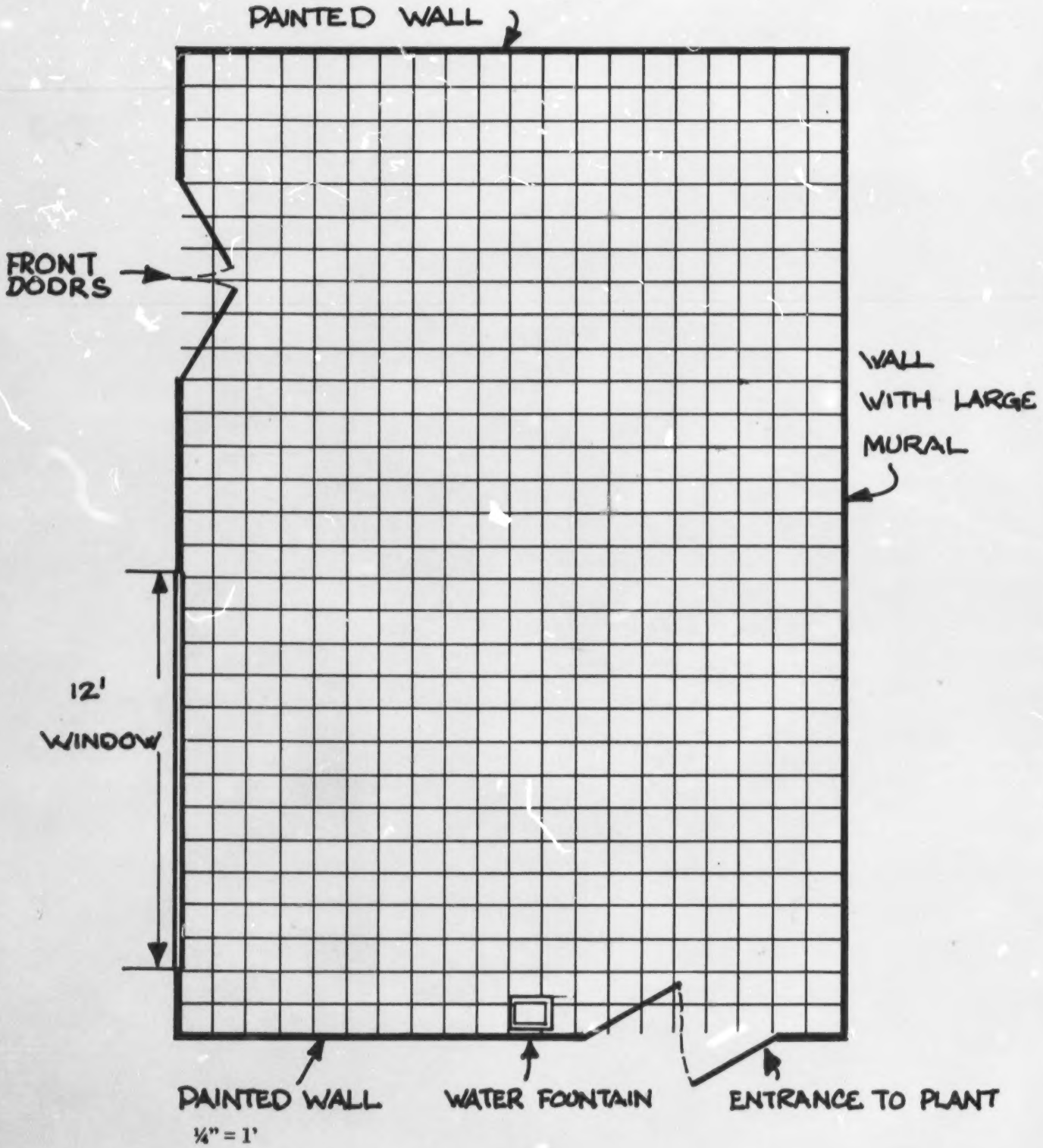
5. After obtaining all information on what you wish to purchase, total for an estimate of cost – if over, be sure you can justify it.

6. Rough draft your sketched layout (use page 5 as a practice sheet). Accurately sketch where you would have the furnishings placed for ease of visitor movement, convenience for employees, use of natural lighting, and any other special considerations. (If you are having problems, check with your teacher.)

7. Sketch the furnishings onto the final graphed layout sheet (see following page). Use your imagination, a ruler, drawing ability, or whatever you can to aid you in making sure the dimensions for each piece of equipment or furniture fit into the ¼-inch per foot squares ensuring proper space and arrangement.

8. Attach a typed list with types of equipment or furniture, dimensions, color, amount, brand, company to purchase from, and any other important information you acquired.

9. Submit this sketch and typed page to your vice-president (teacher) for review and consideration of your work.


PAINTED WALL
FRONT DOORS
WALL WITH LARGE MURAL
12'
WINDOW
PAINTED WALL
WATER FOUNTAIN
ENTRANCE TO PLANT
¼" = 1'

CHECK-OUT ACTIVITIES

The statement below explains the activity you must be able to complete in order to finish this module. After you have gone through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PLANNING OFFICE LAYOUT.

Your instructor will provide office supply catalogs and instructions for planning office layout. Plan the layout for the Purchasing and Accounting Department.

CHECK-OUT ACTIVITY

You have just received a thank-you note memo from the Vice-President for your work and help with the reception area, and you feel proud for being asked to submit your ideas. He/she indicates that there were a few modifications to your proposed plans, but overall they were very good.

In this memo you are asked to submit more of your ideas for the new area in the building that will be occupied by the Purchasing and Accounting Department. (This is the area in which you will be working, since you are secretary for the Purchasing/Accounting Department.) This really means a lot to you because you can help arrange and suggest purchases for the area where you and your fellow employees work. Thus, the department can operate with more efficiency and comfort. All furnishings will be purchased new, unless the $10,500 allotted cannot furnish the new area sufficiently. If it cannot, old furnishings will be used in order to purchase new equipment, a need which has a higher priority. The vice-president wants an IBM Selectric purchased for your desk so comparison can be made between the machines already used in the company and new types of machines. Plan the layout for the Purchasing and Accounting Department following this procedure:

1. Obtain an office supply catalog.

2. Use the catalog and information given below to prepare a typed list of equipment and furniture you wish to recommend. Include measurements, colors, and price of each piece of furniture and color and price of each piece of equipment. Try to stay within the $10,500 limit.

Information you have gathered includes:

A. Seven employees: Purchasing and Accounting Supervisor, Purchasing Agent, Receiving Clerk, Accounts Receivable Clerk, Accounts Payable Clerk, General Accountant, and yourself.
B. Each employee needs a regular office desk except the supervisor and you. He/she needs a larger desk to help facilitate all of the paperwork, and you need an L-shaped secretarial desk.
C. Each employee needs an adding or calculating machine. (Price checking will help determine a machine for your use.)
D. You need an IBM Selectric Typewriter.
E. Filing cabinets are needed for:
    1. Your supervisor (1 large and 1 small)
    2. Purchasing (1 large)
    3. Accounting (1 large)
    4. Secretary/receptionist (1 large and 1 small)
F. Two book cases or consoles are needed for you, and/or supervisor, and general use by the whole department.
G. Each employee needs a waste can.
H. Each desk needs an in-out basket.

3. Use the floor plan on page 15 to make a rough-draft sketch of the furniture layout. [Each 1/4 inch (.635 cm) equals 1 foot (.3048 m).] Follow these guidelines.

   A. Main circulating or highly traveled aisles may vary in width from 5 to 8 feet (1.5 to 2.4 m). Less important aisles should be 45 to 65 inches (114 to 165 cm) in width.

   B. Aisles between desks should not be less than 36 inches (91.4 cm).

   C. Space occupied by chairs for each desk should not be less than 28 inches (71 cm), preferably more.

   D. If a file drawer opens to an aisle, the aisles should not be less than 30 to 40 inches (76.2 to 101.6 cm).

   E. Large open spaces are better than small room spaces for supervisory areas.

   F. Movable, rather than fixed, partitions should be considered where needed.

   G. Natural window light should come over the individual's left shoulder-- artificial lighting would never be placed in front of the worker.

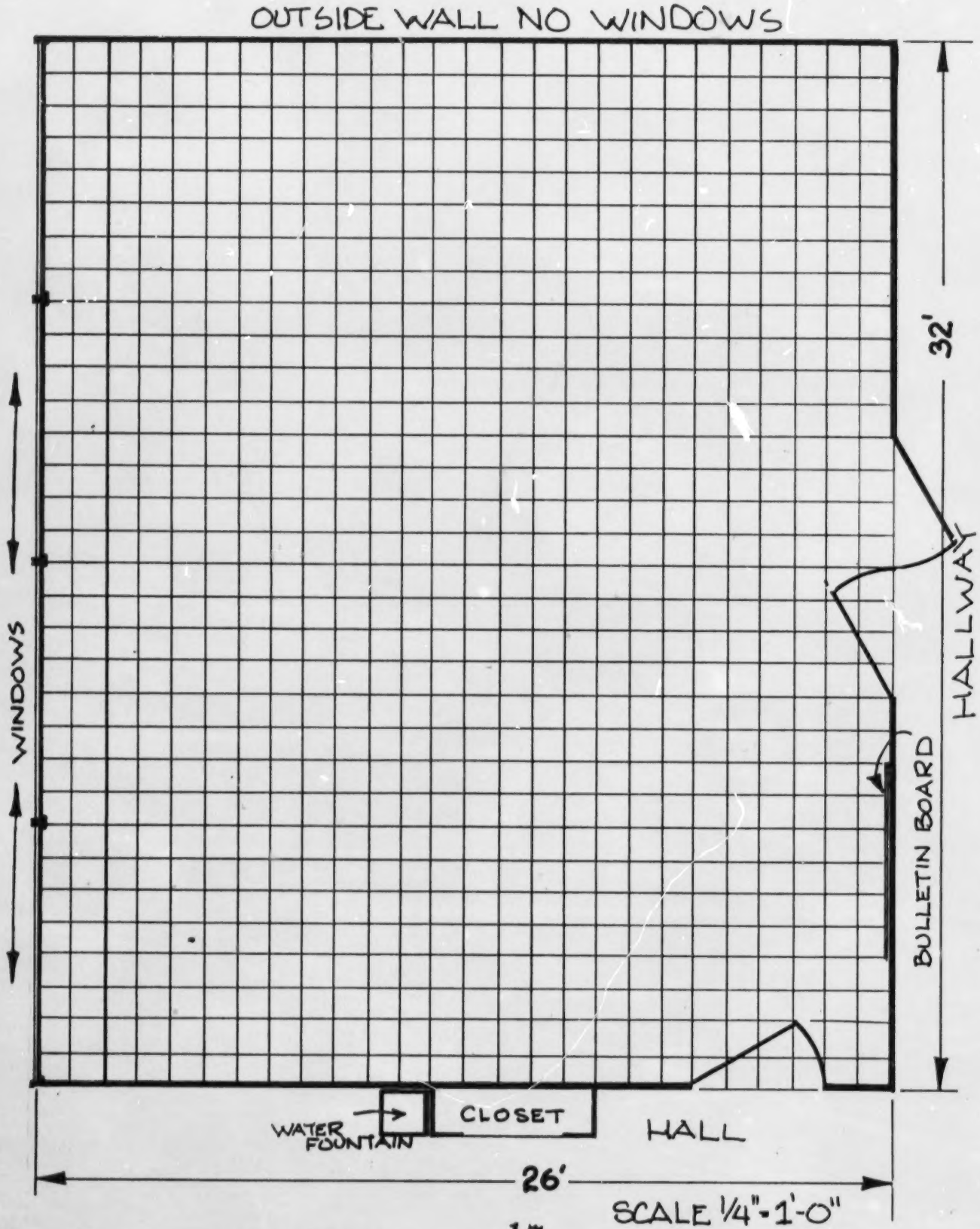
   H. Desks should follow these same directions unless employees' desks must be placed facing each other.

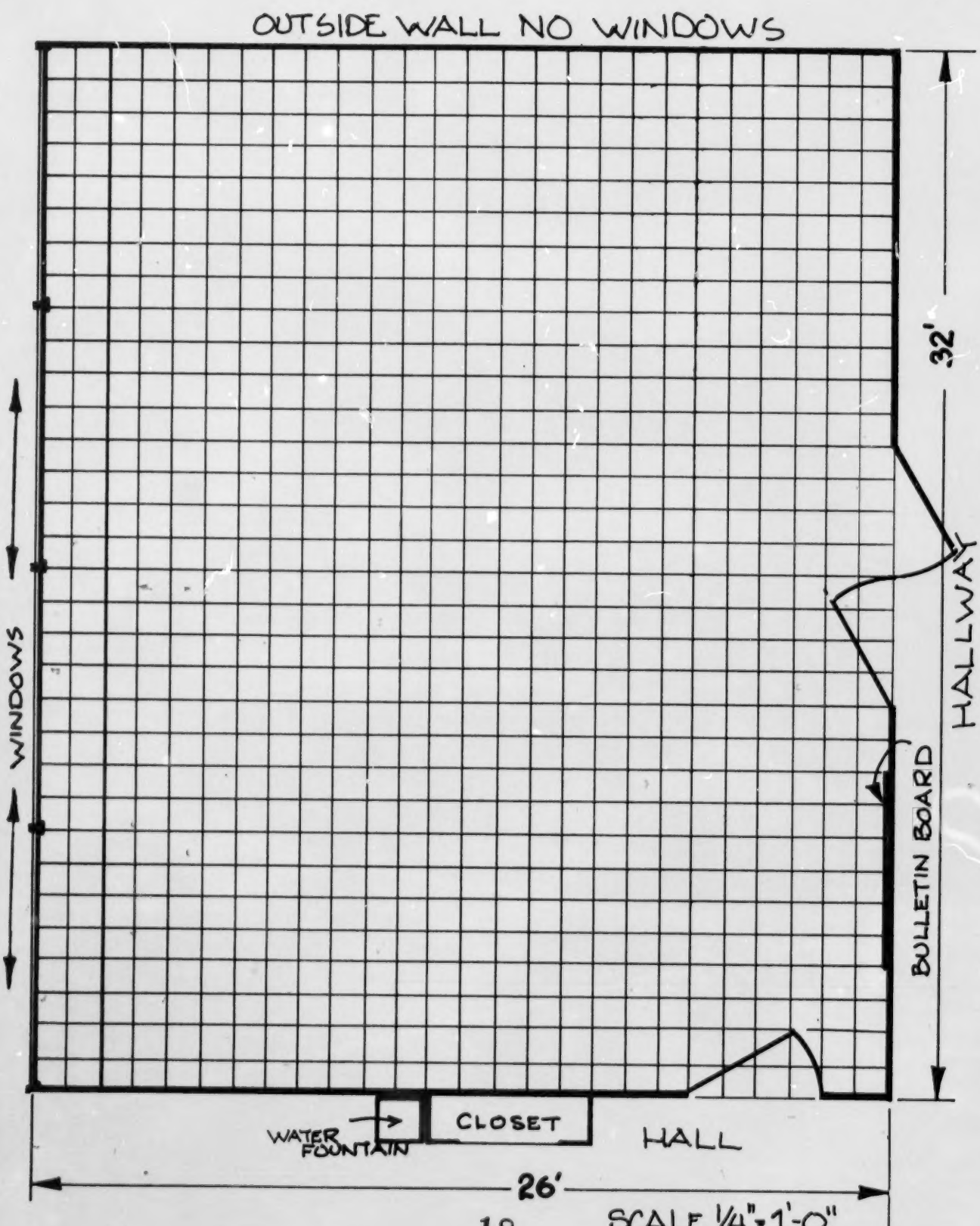
   I. Desks should not be placed side by side, unless an aisle is easily accessible to each desk for ease in traffic flow.

   J. Filing cabinets or drawers should be placed against walls or railings.

4. Prepare a final layout by sketching the furniture onto the floor plan on page 16.

5. Attach the typed list of equipment and furniture to the final layout, and submit them to your instructor.


OUTSIDE WALL NO WINDOWS
32'
HALLWAY
BULLETIN BOARD
WINDOWS
WATER FOUNTAIN
CLOSET
HALL
26'
SCALE 1/4"-1'-0"


OUTSIDE WALL NO WINDOWS
32'
HALLWAY
BULLETIN BOARD
WINDOWS
WATER FOUNTAIN
CLOSET
HALL
26'
SCALE 1/4"-1'-0"

Instructor's Final Checklist

DETERMINING OFFICE LAYOUT

Check the student's performance in the following elements of determining office layout.

Place an X in the appropriate box indicating not accomplished, partically accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished, or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

	Student Performance			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1. The student determined the proper equipment and furniture for the office.	[ ]	[ ]	[ ]	[ ]
2. In the process of checking and preparing the list of furniture and supplies, from catalogs, the student demonstrated a thoroughness by:	[ ]	[ ]	[ ]	[ ]
a. Checking sizes and dimensions	[ ]	[ ]	[ ]	[ ]
b. Considering color schemes	[ ]	[ ]	[ ]	[ ]
c. Considering quality and price in buying plans	[ ]	[ ]	[ ]	[ ]
d. Considering service and maintenance	[ ]	[ ]	[ ]	[ ]
3. In the process of drawing or plotting the room layout, the student:				
a. Accurately used dimensions of furniture and equipment to scale size	[ ]	[ ]	[ ]	[ ]
b. Considered sizes of aisles, desk placement, file accessibility and attractive arrangement	[ ]	[ ]	[ ]	[ ]
c. Demonstrated thought and presented finished work in a neat manner	[ ]	[ ]	[ ]	[ ]

ORGANIZING AND PLANNING
DETERMINING OFFICE LAYOUT

INSTRUCTOR'S MANUAL

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NOTES TO TEACHER

To prepare this module for student use, the following perishable items need to be duplicated.

Room sketch, page 5 (to be used by student as practice sheet for completing Instruction Sheet III)
Self-Check I Illustration, page 8
Graphed Layout Sheet, page 11
Final Check-Out Graphed Layout Sheets, pages 15 and 16 (may duplicate either page 15 or 16; need 2 copies per student)
Instructor's Final Checklist, page 17

Evaluation of the Check-Out Activity is subjective. There is not precise answer for an office arrangement, however. the principles outlined on page 14 should be considered in the final design of the office.